The German Furniture Market

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Summary

Germany boasts the largest furniture market in Europe, with USD 23.12 billion in 2004. After the market had previously experienced its most difficult period in over 10 years, the industry reported a 1.5% increase in sales for 2004. Furniture manufacturers face wafer-thin margins, due to stiff price competition, and through price pressures from large organized buying cooperatives. German producers face additional difficulties because of high non-wage labor costs. As a result of price increases of auxiliary and raw materials, the manufacturing industry is planning to raise their prices in 2005 by 3% to 5%. The furniture trade market was valued at USD 35 billion in 2003 with a 1.5% increase expected for 2004.

2003 figures show that Germans continue to spend substantially more on furniture than the average EU consumer. Germans spent USD 424 per capita in 2003, compared with the average USD 285 spent by EU citizens. Thus, the rewards for establishing a foothold in the German market can be high provided companies have the matching product and strategy.

Research forecasts a shift in marketing and distribution channels away from classical forms such as furniture showrooms and other retail outlets toward new media such as direct-to-consumer, e-commerce, internet, and shopping. Such trends require proper preparation for market entry, including the utilization of new marketing tools, (e.g., 3-D digital presentations) and an internet presence. The low-end market segments and the "cash-and-carry" sector benefit from these trends, in particular. High-end furniture will still require classic distribution channels, such as showrooms, but the consumer will increasingly make buying decisions based on a supplier's internet presence and other new media advertisements. A joint venture with a well-established German partner remains an important market access option. The market also demands a high degree of flexibility from suppliers, such as the readiness to sell single pieces of furniture, rather than complete sets through agents and distributors.

Market Overview

Exchange rate used in this report: EUR 1 equals USD 1.15. Totaling USD 23.12 billion in 2004, German furniture production is the second-largest in Europe, and constitutes 25% of the total European market (Italy accounted for 26% of total EU production with USD 23.23 billion). Germany experienced a 10-year period of growth, beginning with the reunification of Germany in 1990 and ending in the year 2000, when the market culminated at USD 20.15 billion. From 2000 to 2003 the furniture market has steadily decreased. A recovery up to USD 23.12 billion is expected in the year 2004.

During the first nine months of 2004, German furniture production witnessed total sales of USD 17 billion, which can be broken down as follows: 1) seating and sofas, 38%, 2) kitchen furniture, 17 %, 3) office and shop fitting furniture, 10 %, 4) other furniture, 30%, 5) mattresses 5 %.

Compared with the same period in 2003, production of seating and sofa increased by 3.4 % to USD 6.4 billion; kitchen furniture increased by 5.2 % to USD 2.6 billion; and mattress increased by 0.8% to USD 0.8 billion. Production of living room and bedroom furniture dropped by 0.7 % to USD 5.1 billion; and the German office furniture and shop fitting furniture segment decreased by 4 % to 1.8 billion. The high production was based on kitchen furniture sales resulted from a large increase in exports.

Despite sluggish furniture consumer sales of USD 35.07 billion in 2003, down 11.3% from USD 39.1 billion in 2002, Germany still remains the highest per capita spender on furniture in Europe. At USD 424 annually, the average German outspends his European neighbors by a substantial margin (followed by Austria with USD 392; Sweden with USD 374; Denmark with USD 351 and Belgium with USD 351.) The other western European countries rank between USD 106 (Portugal) to USD 250 (Finland) per capita annual furniture expenses. These figures confirm that Germans are willing to spend a relatively high portion of their income on furniture, even in difficult periods. Less home and office building construction, lower net household income, higher taxes and energy costs, the suspension of tax reforms as well as high unemployment and low growth have all contributed to the decline in furniture sales.

Market Trends

Current furniture trends favor functional, individual, ergonomic, and eye-catching designs. Cocooning, created by Faith Popcorn three decades ago has become an important trend in the German furniture market in recent years. "Homing" is the name given to a further development of cocooning but additionally incorporates media and home entertainment centers as well. It expresses the home as a port of refuge and center of all endeavours in life and counters rapid social and economic change, experienced as a source of uncertainty and stress. The consumer wants to retain at least his ability to shape his home and this is expressed through multifunctional furniture with the ability to re-design and arrange the home environment. In addition, wellness and recreational areas become increasingly important.

Furniture taste is tending towards a bolder approach in light and color. Currently popular wood species are beech, cherry, alder and birch. These woods are of lighter colors, from beige to light red and light brown. If the finish is light and shiny in appearance, oak is also a common choice. Darker wood tones, such as walnut, remain a popular choice, and tropical woods, such as teak, wengé and palisander are also frequently in demand due to their natural varnishes of oil, waxes and other environmentally friendly substances.

Furniture textiles are displayed in a large variety of materials and colors. The current color trends are bright red, green and violet, as well as black. Chair frame colors range from natural wood to white. Transparency is also one of the new themes, i.e., satinized glass is "in", whether used as the front of a kitchen cabinet or tabletop. Matte as well as high-gloss varnishes are popular; metallic varnishes, non-skid-varnishes and texture-like color, and pattern designs prevail. There are no limits to the diversity in the surface sector. The upholstery fabrics continue to be wool, cotton, flax and linen, as well as micro-fibers and leather. Both trendy and classical furniture lines support and complement each other.

Service and sales staff at the POS are of high importance. Many POS use special event marketing to attract the consumer, such as "The American Days." Increasingly, service and training of the sales force, both before and at the POS, are becoming crucial.

Import Market

Although statistical data conveyed a large and interesting market for furniture, the industry faced difficulties in recent years as a result of a sluggish economy. Since 2000, Germans have been saving more money than they have spent. According to the furniture manufacturing association, 2004 was the turnaround year with production increases of 1.5% percent. The forecast for 2005 is a 2 to 3 % increase. Statistically, on average the German household buys a new kitchen every 20 years, and sofas are replaced approximately every eight years. With its 5% increase in 2004, the kitchen furniture industry is one of the segments driving the upswing. In January 2005, the International Bath & Kitchen Association – NKBA - and the German Arbeitsgemeinschaft Moderne Küche – AMK – signed an agreement to establish an international bath and kitchen association. More details will be discussed and documented at the K/BIS in Las Vegas, scheduled for May 10 to 12, 2005.

In 2004, the number of furniture manufacturers in Germany declined from 1,293 to 1,201. Employee lay-offs in 2003 totaled 10,386, and at the end of the year 2003 the furniture industry employed 137,298 workers.

The German Market for Furniture

(USD million)				Estimated Average Percentage of Annual Growth
	2002	2003	2004*	2005*
Imports	7,570	7,890	8,010	+1.5%
Local Production	23,350	22,770	23,120	+1.5%
Exports	5,760	5,660	5,750	+2.0%
Total Market	25,160	25,000	25,380	+1.5 to 2%
Imports from the United States	38.87	40.8	34.5	
	1.3	1.0	1.7	1.3
Exchange rate	1.15	1.15	1.15	1.15

*Estimates
(Source: HDH - VDM Confederation of German Woodworking and Furniture Industries, Federal Statistical Office)

Local Production

Sales were nearly stagnant in 2003, decreasing by 0.79 % to EUR 25 billion from EUR 25.2 billion in 2002. The domestic production, however, decreased by 2.48 % from USD 23.4 billion in 2002 to USD 21.5 billion in 2003. These figures do not reflect the increasing share of re-imports from Poland, and the Czech and Slovak Republics, the manufacture locations of many German companies. Germany remains one of the largest producers of furniture in Europe, supplying 38,500 German households and many export markets. The following pieces of furniture were produced in Germany 2001: 5 million wardrobes and linen cupboards, 3.5 million wall shelving units, 3 million lounges/sofas, 2.7 million office chairs, 2.6 million shoe cabinets, 2.3 million upholstered chairs, 2.2

million beds, 2 million kitchens, 2 million desktops, 0.85 million dining-room tables, and 0.7 million bookcases.

Imports

Almost 84.9 % of imported furniture into Germany originates in Europe. Imports reached USD 7.9 billion in 2003 and are estimated at USD 8.01 billion for 2004, an increase of about 1.4 %. Major suppliers are companies from Western European countries such as Italy, Denmark and Austria, but also from Central and Eastern Europe, and Asia. Eastern European imports account for more than 50% of total EU imports into Germany. This includes imports from German manufacturers abroad. The principal countries exporting furniture to Germany include Poland, the Czech Republic, Hungary and the Slovak Republic. Imports account for about 40% of furniture trade showroom space.

For 2004, a slight increase of furniture imports is predicted as result of a slight upswing of the economy. Imports from Western EU countries dropped by 14.1 %, and by contrast, imports from Central and Eastern European countries rose by about the same rate, the Western EU countries losses. Furniture imports from Asia, saw a real boom, up 31.8 % from USD 597 million in 2002 to USD 785.5 million in 2003.

Imports from the United States

Overall, imports of furniture from the United States declined from USD 40.8 million in 2003, to an estimated USD 34.5 in 2004. However, the performance of individual product groups, varied significantly. Imports of U.S. seating and office furniture increased, and imports of bedroom and dining room furniture remained stable. Mattresses, kitchen furniture and furniture for hospitals, schools, gardens, etc., by contrast, dropped steeply from already low levels. The market demands a high degree of flexibility from suppliers, such as the readiness to sell single pieces of furniture rather than complete sets through agents and distributors. A number of U.S. furniture manufacturers produce in Europe and their sales are not captured in the import statistics as imports from the United States.

Several U.S. furniture producers have been successful in the German market - La-Z-Boy, Steelcase, Knoll International, Klaussner, Ashley, Stanley, Rowe, Lane, Allsteel, HON Company, Markant, Herman Miller, and Marsco. Each has developed its own distribution strategy. One approach is selling through a European distributor network headquartered in the Netherlands; and another penetrates continental Europe through its European headquarters in the United Kingdom. Others sell directly to a German distributor and/or to the end users, or concentrate on particular segment only. One American company has formed a joint venture with one of the largest German furniture manufacturers, and has brought innovative sales force training programs and new marketing and distribution plans to its German partner. Many U.S. firms have had difficulties entering the German market, but the changes in distribution channels in Germany away from the traditional trade towards more direct interaction with retailers and consumers should gradually benefit foreign suppliers, including those from the United States.

Competition

Major Players

The major players in the furniture market are as diverse as the distribution channels. Furniture is sold via self-service markets, department stores, DIY-stores, furniture retail stores amongst others.

In 2004, a specialized magazine asked managers, shop fitting decision makers and other experts to vote for the 10 best "take-away" furniture outlets and the 10 best youth-oriented furniture stores.

The following outlets were rated Top Ten: POCO (Bergkamen); Moebelix owned by Lutz (Austria-Wels); Osca owned by Zurbrueggen (Unna); Moebel Boss (Porta Westfalica); Preisrebell owned by Finke (Paderborn); Roller (Gelsenkirchen); SB-Aktionshallen der Wohngruppe (Untereisesheim); Domaene-Filialen (Hardegsen); SB-Lagerkauf owned by Tejo-Gruppe (Halstenbek); and Sconto owned by Walther (Gruendau-Lieblos). The best ten young furniture department stores were: Mobile owned by Kempf (Sulzbach); Mambo (Bonn); Loft owned by Ostermann (Bottrop); Z2 owned by Zurbrueggen (Bielefeld); K.N.A.S.T. owned by Knuffmann (Krefeld); Schwaabs Trend Discount (Ingelheim); Nimm Mit (Heuchelheim); Hardi owned by Hardeck (Bochum); Avanti (Rheinbach); Mömax owned by Lutz (Hirschaid).

The largest department stores or furniture traders by sales in 2002 were, Ikea (USD 2.46 billion); Karstadt/Quelle (USD 1.82 billion); Höffner/ Möbel Walther (USD 1.45 billion); Porta-Moebel (USD 1.15 billion); Segmueller (USD 851 million); Roller Discount (USD 822 million); Otto Versand (USD 679 million); Moebel Kraft (USD 552 million). The TOP 30 dealers have between 2 (Moebel Kraft) and about 500 POS (Daenisches Bettenlager).

The two largest players in the furniture manufacturing industry are the Schieder Group with over USD 1 billion in annual sales, including Schieder upholstery products and Steinhoff Holding International, with Steinhoff Europe. Steinhoff and La-Z-Boy Europe formed a joint venture three years ago.

These two giants are followed by Welle Group; Alno-Group; Casawell / Wellmann-Group; Nobila-Werke; Huelsta Group including Rolf Benz and Ruf; Nobia-Group Germany; and K&M. Each above listed manufacturer employ more than 500 people.

Because of the higher than average increase of kitchen furniture sales following are the TOP eight special kitchen furniture retailers, which operate at store sizes of 6,990 sq.ft. to 39,800 sq.ft. The names, number of outlets and estimated annual sales in 2003 are listed as follows: Plana with outlets in North Rhine Westfalia and southern Germany (41 retailers, USD 94.3 million in 2003); Astroh, Rhein-Ruhr Area and northern Germany (17 retailers, USD 92 million); Kuechen Aktuell (10 retailers, USD 89.1 million); Asmo, in Bavaria and Rhineland-Palatinite (16 retailers, USD 51.8 million); Vesta, in the middle of Germany and parts in southern Germany, (15 retailers, USD 57.5 million); Keie incl. Ticco, in the Rhein-Main-Area, Weimar (14 retailers, USD 40.3 million); Foerde, in North Germany, (5 retailers, USD 23 million); Meda, in West Germany, (5 retailers, USD 14.4 million).

Showrooms

Germany is home to more than 22 million square meters (236,806,029 sq. ft) of furniture sales space and has one of the largest furniture showroom total space allotments in the world. Unfortunately, this overcapacity of showrooms, in close proximity to each other, forces retailers in the same area to grow with competition. In 1995, German showrooms expanded by 5,500,000 sq. ft. Showrooms of 330,000 to 660,000 sq. ft. are not unusual. The retailer "Möbel-Inhofer" from Senden, Bavaria, is the largest in Germany, and owns 796,529 sq. ft. The average sales space of the 10 largest retailers has grown from 6.11 million sq. ft. in 2001, to over 6.13 million sq. ft. in 2003 and again to 6.22 million sq. ft. in 2004. The 30 biggest showrooms comprise 15.34 million sq. ft. From 1993 to 2000, showroom space increased by 53.6 %. Since then, the showroom space has been increasing at a slower rate.

Average sales space of the biggest			
furniture retailers (in million sq. ft.)	2001	2003	2004

10 biggest	6,113,952	6,124,716	6,221,515
20 biggest	10,640,214	10,699,419	10,763,867
30 biggest	14,816,646	15,010,398	15,338,511

12,000 showrooms of various sizes exist in Germany, but the top one hundred chains of retailers comprised more than half of all furniture sales in 2003.

Buying cooperatives and furniture manufacturers

Large manufacturers and powerful buying cooperatives dominate the German furniture market. In 2003, the five leading buying cooperatives achieved more than USD 15 billion in sales and 45% of total German furniture sales, including lamps, accessories, and carpets. These were Begros (USD 3.91 billion sales, ca. 150 POS); Atlas (USD 2.55 billion, ca. 100 POS); Union (USD 3.48 billion, ca. 167 POS); VME (USD 2.5 billion, ca. 280 POS) and Garant (USD 2.07 billion, ca. 3,300 POS). The top ten buying cooperatives account for 56% of Germany's total furniture market.
Buying cooperatives dominate furniture purchases and help to develop showrooms that present an array of products. These home furnishing products include items such as lamps, carpets, cabinetry, and high quality wall hangings. Many cooperatives have also specialized on furniture segments such as kitchens or furniture separated into different price and customer ranges. Buying cooperatives organize promotions, provide merchandise information systems, information on the market, assist with or conduct negotiations with the manufacturers, and take over factoring if requested.

Independent showrooms or retailers are the minority. They have different marketing concepts and their own distribution networks. Retailers such as IKEA, which grossed more than USD 2.46 billion in sales in Germany in 2002 and USD 2.9 billion in 2004, are as well known as the department stores, i.e. Karstadt/Quelle, which grossed annual sales of USD 1.84 billion in 2002.

End-Users

According to research studies, Germans would like to buy more furniture. 27% of the persons polled would like to buy a new sofa, 25% a new bathroom, more than 20% a new kitchen, 19% a new TV-arm chair, and 16% desire a new walk-in-wardrobe, which reflects a continuous demand in all segments. According to this study, 20.41 million people have the purchase of new furniture built into their budgets.

Potential furniture buyers were classified according to age groups and to the level of purchase expectations. Within the group of 16 to 29 year olds, 49% would like to buy furniture; 44% of the group from 30 to 44 years old; 31% in the 45 to 59 age group, and 14% of those 60 and older.

All studies have two results in common; the relatively rich "silver ages" (above 50) and their purchase power have not been yet considered enough, and women are the decision-makers and major furniture buyers within most households.

Market Entry

There are no restrictions or trade barriers for U.S.-made furniture. With the exception of the two categories below, all types of furniture manufactured in the United States may be imported into Germany duty free. The two exceptions are: a) Kitchen furniture, Harmonized Code System (HTS) 9403 4010900 with import duties of 2.7%; and b)

Wickerwork, HTS 9401 to 9403 with import duties of 5.6%. A value-added tax (VAT) in Germany of 16% has to be paid at the port of entry.

The German company Titze GmbH, a research and consultant firm and partner of Aktrin Furniture Information Center, High Point, NC, conducted a study on past, current and future distribution channels for furniture in Germany. The study tracks patterns from 1997 and forecasts up to 2010, and forecasts a shift away from the classical sales through furniture trade and showrooms to new furniture distribution channels, such as mail order business, internet and e-commerce, virtual furniture purchase, TV-shopping, direct sales and factory outlets. These new sales and distribution channels are projected to grow from 8.1 % market share in 2000 to more than 20 % in 2010. This growth will come at the expense of the classical furniture trade whose market share in 2005 of 76.7 % will drop to 69.8 % in 2010. Outlets such as building centers and DIY stores will increase as well. For other retail outlets, the study forecasts a net increase from 8.9 % in 2005, to a 9.7 % share in 2010. In addition, the forecast for total sales in 2010 is USD 33.3 billion, which assumes a yearly increase of 1.5 % compared to 2005.

Specific and well-defined furniture segments, such as upholstered furniture or shaker furniture, still sell through independent agents or distributors. This is often not practicable for other segments. These distributors are most often classified by geographic region and the furniture segments they are selling in Germany. It is difficult to find good distributors because they have to specialize in a few furniture items or styles and the profit margins for both the furniture trade and the furniture manufacturer are very limited. At least 56% of the classical German furniture trade is organized in large buying cooperatives. These cooperatives employ collective buying agents and arrange the sales for members; they provide all types of business and market information, accounting programs, advertise-ment assistance and more. The cooperatives deal with special furniture lines and segments as mentioned above.

It is perhaps overly optimistic to believe that the average customer or end-user of furniture will be familiar with the manufacturer's name and the furniture outlets, but an internet portal, or a TV advertisement, etc., are able to provide them with specific furniture information, linked to the product and the availability of the nearest POS. As more Germans use the Internet to pre-select furniture, it is increasingly necessary for manufacturers to create a web site for their products and POS/dealers. A meter reader for internet sales is the company Ebay, which has taken furniture into their sales portofolio, with annual sales exceeding USD 1 billion. American companies with the potential to export and to penetrate the German market should pay attention to establishing an accessible forum to present product information. It is extremely difficult and expensive to market a brand unknown to the German consumer. At present, a furniture manufacturer's home page may be of equal interest to a competitor as to the German consumer, but the forecast is that this will change and the Internet will soon become an indispensable marketing tool.

Furniture sales by distribution channels in Germany from 1997 to 2010 in million USD and Percent Change

Distribution channel	Sales 1997		Sales 2000		Sales 2005		Sales 2010	
		%		%		%		%
Specialty Furniture Trade*	24,334	84.95	23,894	83.72	23,678	76.69	23,208	69.78
Other Retail Outlets:								
Builders Centers/DIYStores	920	3.21	1,048	3.67	1,371	4.44	1,643	4.94
Office furniture retailers	5	0.02	10	0.04	65	0.21	160	0.48
Cash & Carry markets	153	0.54	115	0.40	114	0.37	113	0.34

Wholesalers of white goods	64	0.22	61	0.21	46	0.15	23	0.07
Garden centers	36	0.12	41	0.14	56	0.18	70	0.21
Wood Dealers	128	0.45	128	0.45	136	0.44	150	0.45
Coffee shops	5	0.02	10	0.04	9	0.03	13	0.04
Department stores	307	1.07	317	1.11	389	1.26	456	1.37
Discount food stores	5	0.02	15	0.05	54	0.17	77	0.23
Plumbing Trade	378	1.32	332	1.16	250	0.81	230	0.69
Self-service outlets	205	0.71	179	0.63	161	0.52	160	0.48
Special item outlets	41	0.14	77	0.27	93	0.30	113	0.34
Other	3	0.01	3	0.01	6	0.02	10	0.03
Subtotal, Other Retail Outlets	2,250	7.86	2,336	8.18	2,750	8.90	3,218	9,67
Future/New Media Channels:								
Mail order business	1,871	6.53	2,048	7.18	3,118	10.10	3,981	11.97
Internet and E-commerce	10	0.04	15	0.05	417	1.35	1,271	3.82
Virtual furniture purchase	0	0.00	5	0.02	150	0.49	400	1.20
TV-Shopping	0	0.00	3	0.01	76	0.25	153	0.46
Direct sales	179	0.62	240	0.84	603	1.95	785	2.36
Factory Outlet Center	0	0.00	0	0.00	83	0.27	246	0.74
Subtotal, Future/New Media Furniture Markets	2,060	7.19	2,311	8.10	4,447	14.41	6,836	20.55
Total all distribution channels**	28,644	100.00	28,541	100.00	30,875	100.00	33,262	100.00
*Includes: specialized trade, recent living outlets, furniture discounters, office specialized trade, bed specialized trade, upholstery furniture specialized trade, furniture cash & carry markets, furniture public sales halls, kitchen specialized trade.								
**2001	Yearly growth rate: -2%							
2002-2005	Yearly growth rate: +2.5%							
2006-2010	Yearly growth rate: +1.5%							

Individual furniture websites for furniture trade and manufacturing associations exist, as well as Internet promotion by furniture trade and furniture manufacturers, and publishers. A general portal, where the consumer can search for a single piece of furniture, or for segment-oriented furniture, without pre-knowledge of the manufacturers' or brand name, does not exist. In addition, links to the closest POS for the end consumer and information about quality and environmental sustainability are not currently available.

Such a web portal was under construction in 2003 but was never completed and large manufacturers set up their own commercials on TV, e.g., Huelsta.

Companies would be well served to consider these developments in distribution channels when developing a marketing strategy for Germany. U.S. firms that relied solely on German furniture showrooms in the past did not necessarily reach their target customer groups. Utilizing new technologies and marketing tools, may open up new possibilities for marketing to, and communicating information with, customers all over the country. Other practices and marketing strategies such as ready availability and speedy delivery of furniture need to be combined with utilizing the new media. Very few companies have the resources to set up their own showrooms in Germany. A U.S. company wishing to enter the market would be well advised to set up its distribution through one of the German companies already maintaining retail outlets throughout the country.

Opportunities for Profile Building

Major Trade Associations

Verband der Deutschen Moebelindustrie e.V. (HDH-VDM) Hauptverband der Deutschen Holz und Kunststoffe verarbeitenden Industrie und verwandter Industriezweige e.V. (Furniture Industry Association of German woodworking and furniture industries including plastic furniture), www.hdh-ev.de

BVDM - Bundesverband des Deutschen Möbel-, Küchen- und Einrichtungsfach-handel e.V. (German trade association for furniture, kitchen, and shop fitting), www.moebelhandel.org

Deutsche Gütegemeinschaft Möbel e.V. (Notified body for furniture, customized marketing studies) **www.dgm-moebel.de**

Verbaende Dr. Krause Deutscher Ladenbau – DLV, (Shop fitting association), www.ladenbauverband.de

Verband Büro-, Sitz- und Objektmöbel e.V. (Office furniture association), www.buero-forum.de

Verband der Deutschen Küchenmöbelindustrie (Kitchen furniture industry association), www.vhk-herford.de

Verband der Deutschen Polstermöbelindustrie e.V. (Upholstery furniture industry association), www.vhk-herford.de

Arbeitsgemeinschaft Moderne Küche e.V. (Kitchen furniture industry association), www.amk.de

Major Trade Publications

Möbelmarkt - www.moebelmarkt.de
Möbelkultur - www.moebelkultur.de
DMK - Die moderne Kueche - **www.kuecheninfo.net**
Euwid Moebel - www.euwid-moebel.de
AIT - www.ait-online.de
Boss - www.bitverlag.de
CHEFBÜRO - www.chefbuero.de
BüroSpezial - www.officeabc.de

Major German Furniture Trade Fairs

IMM - International Furniture Fair, January 16 - 22, 2006 (annual show), www.koelnmesse.de or **www.@koelnmessenafta.com**

Orgatec, October 24 - 28, 2006 (biennial show), International Trade Fair for Furnishing and Management of Offices and Office Facilities www.koelnmesse.de or **www.@koelnmessenafta.com**

Gafa / Spoga Sep. 4 - 6, 2005 (annual show), www.koelnmesse.de or **www.@koelnmessenafta.com**

HomeTech, International Trade Fair for Household Appliances, March 1 – 5, 2006 (biennial show),
www.koelnmesse.de or **www.@koelnmessenafta.com**

EuroShop, International Trade Fair Shop Fitting, Display, and Merchandising, February 19 - 23, 2005 (triennial show), **www.messe-duesseldorf.de** or www.mdna.com

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